

Version: 2.0.1



Contents

Terminology	<u>3</u>
Getting Started	<u>5</u>
Mobile Caregiver+ Overview	<u>6</u>
Installing Mobile Caregiver+	<u>9</u>
Android	<u>9</u>
Apple iOS	<u>9</u>
Updating your App	10
Updating Mobile Caregiver+ on an Android Device	11
Updating Mobile Caregiver+ on an Apple Device	11
Self-Registering: Only applies if directed by your Agency Administrator	to do so.12
Logging In	15
Forgetting your Password	17
Changing Your Password	19
Accessing the Main Menu	22
Changing the Time Period View on the Home Page	24
Accessing Help and Support	26
Viewing Active Agencies (Accounts)	28
Managing Your Profile	31
Checking Messages	35
Viewing Messages	35
Filtering Messages	36
Deleting a Message	37
Logging Out	39
Preparing for a Visit	41
Viewing Recipients	42
Adding an Unscheduled or New Visit	45



	Getting Directions to a Recipient's Address	<u>49</u>
	Calling a Recipient or Emergency Contact	51
	Viewing a Recipient's Documents	<u>53</u>
	Viewing a Recipient's Notes	<u>55</u>
N	Managing Visits	57
	Starting and Ending a Visit	<u>58</u>
	Completing a Visit When you are Offline	66
	Adding Notes and Sending Alerts	68



Terminology

The following terms are used throughout the application and throughout this User Guide.

- Administrator (Admin): An individual or individuals assigned and responsible for running an agency or organization also known as: Administrator, Billing Agent, Scheduler, Human Resources, Office Manager, Agency Owner, Service Broker/Case Manager, Fiscal Agent.
- Caregiver: An individual providing services/care is also known as: Live-in Service Provider, Rendering Provider, Billing Provider, Home Health Aide, Adult Daycare Provider, Provider, Community Mental Health Provider, Agency Providers, PDS Employee, Independent Provider, Service Provider, Participant Directed Service Provider, Personal Care Provider, Group Home Provider, Direct Care Worker, Direct Service Provider, Non-Agency Provider.
- Healthcare Common Procedure Coding System (HCPCS codes): HCPCS is a standardized healthcare coding system that is used primarily to identify services provided also known as: Service Description, Billing Codes, Procedure Codes, Revenue Codes. (See also Service Codes).
- **Modifier:** (Supplement to the *HCPCS Codes/Service Codes*) Two digits used for billing to provide extra details (when applicable) concerning a service/care provided by a Caregiver. Not all service codes have modifiers.
- **Agency:** A business established to provide a service and employs individuals to render care also known as: Traditional Home Health Agency, Fiscal Management Agency (FMA), Provider Agency, Billing Provider.
- **Payer:** Payer refers to the health plan or organization that provides payment to the Caregiver or Agency for the services that are provided to its Recipients by its Caregivers.
- **Prior Authorization/Service Authorization:** Health plans authorize care for a Recipient for a specified period, for a specified unit (time increment for a service code) or for a specified number of visits.



Recipient: An individual receiving services/care is also known as: Client, Participant, Individual, Family Member (child, parent, spouse, etc.) PDS Employer, Beneficiary

Schedule: A schedule includes one or multiple visits that are most often planned by Administrators for Caregivers to provide services to Recipients. Caregivers may need to schedule a visit – when service is required on a weekend, for example, when an administrator is not available.

Service/Service Code: Service Codes (see also HCPCS codes) are used to define the type of service being rendered and the amount of time allotted for that service (unit). Service codes may include a series of tasks. For example, Unskilled Respite Care may include tasks like Cleaning or Grooming. Some, but not all service codes, may have modifiers that reflect multiple Recipients, same day, or time of day of visit.

Visit: A scheduled date, time, and place for a Caregiver to provide services to a Recipient and the services to be provided.



Getting Started

Click a topic below:

Mobile Caregiver+ Overview

Installing Mobile Caregiver+

<u>Android</u>

Apple iOS

Updating your App

<u>Updating Mobile Caregiver+ on an Android Device</u>

<u>Updating Mobile Caregiver+ on an Apple Device</u>

Self-Registering

Logging In

Forgetting your Password

Changing Your Password

Accessing the Main Menu

Changing the Time Period View on the Home Page

Accessing Help and Support

Viewing Active Agencies (Accounts)

Managing Your Profile

Checking Messages

Viewing Messages

Filtering Messages

Deleting a Message

Logging Out



Mobile Caregiver+ Overview

You are here: <u>Mobile Caregiver+</u> > <u>Getting Started</u> > Mobile Caregiver+ App Overview

EVV provides a downloadable Mobile App that you can access on your smartphone or tablet. The app allows you, the caregiver, to view your schedule, get turn-by-turn directions to the recipient's location and track mileage in real-time using your smart device's built-in GPS, and verify visits on location, making it easy and efficient for both you and your provider agency.

The Mobile Caregiver+:

- Is customized and displays your schedule, the recipient's complete care plan with service detail and the recipient's profile.
- Allows validation and verification of services with an electronic signature.
- Allows you and your provider agency administrator to communicate safely and securely.

The app's home page (which displays your schedule) has these components:

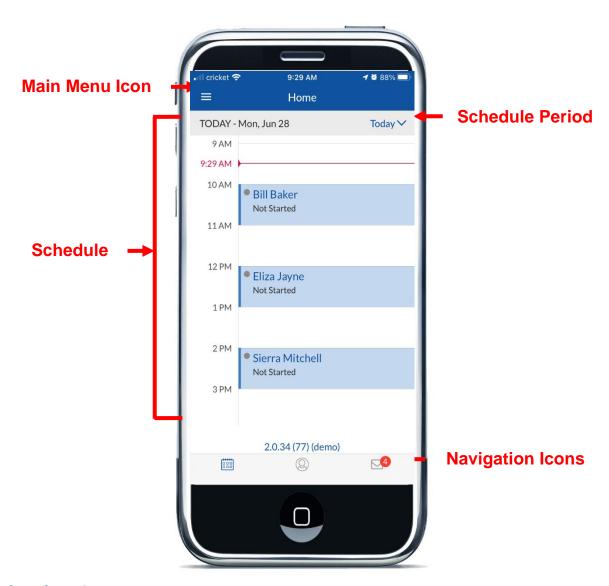
- Main Menu: Located at the top left of the screen, the menu provides options that let you request a password change, get help, view provider agencies, update your profile, choose the language you want to see in the app, choose face or fingerprint ID if your device offers it, and log out.
- Schedule period dropdown: Located at the top right of the home page where you
 view your schedule, allows you to select the time period you want to see your
 schedule for. You can choose Today (the default), Last Week, This Week, or Next
 Week.
- Navigation icons at the bottom of the screen organize information and provide access to different types of information:
 - Home: Displays your schedule for the schedule period you select. For each scheduled visit, you will see the visit day, date, time, recipient's name, and appointment status (Not Started, Late, Missed, In Progress and Completed). When you select a visit, you can see:
 - The recipient's complete care plan with service detail.

6



- Services and tasks, which you and the Recipient (or their designated signer) sign off with an electronic signature.
- **Recipients:** Shows all the recipients for whom you provide care. You can see:
 - Recipient addresses and choose one to open Google maps to get directions.
 - Phone numbers.
 - Emergency contact information.
 - Documents that have been uploaded by your administrator.
 - Any notes you may have entered for completed visits or that your administrator has entered.
- Messages: Allows a provider agency administrator to communicate with you safely and securely. You cannot send or reply to messages; you can only receive them.





- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out



Installing Mobile Caregiver+

You are here: Mobile Caregiver+ > Getting Started > Installing Mobile Caregiver+

The Mobile Caregiver+ application can be downloaded via the app stores available on any smart mobile device.

Android

- 1. On your Android device, locate the Play Store.
- 2. Open the Play Store app.
- 3. Search, or browse, for Mobile Caregiver+.
- 4. Select the Mobile Caregiver+ app.
- 5. Tap *Install*.

Apple iOS

- 1. On your iPhone, iPad or iPod Touch, locate the Apple App Store.
- 2. Search, or browse, for **Mobile Caregiver+**.
- 3. Select the Mobile Caregiver+ app.
- 4. Tap *Get* on the right side of the screen, then follow the instructions to *Install*.

If asked, enter your Apple login credentials.

Related Topics

- Mobile Caregiver+ Overview
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

9

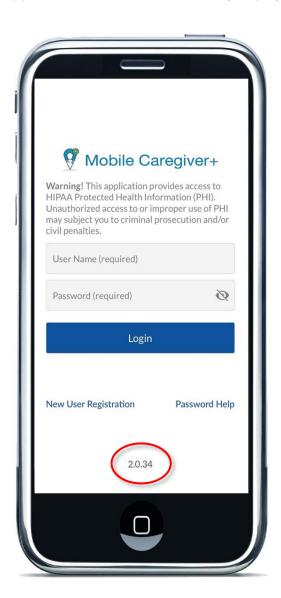


Updating your App

You are here: Mobile Caregiver+ > Getting Started > Updating your App

regularly releases updates to our Mobile Caregiver+. The version of the Mobile Caregiver+ software is iOS 2.0.31 and Android 2.0.31.

To confirm the version of the Mobile Caregiver+ software that is on your smart device, open the Mobile Caregiver+ application from the smart device. The version number appears at the bottom of the logon page.





If the current version isn't iOS 2.0.31 or Android 2.0.31, you should update your app.

It is also important to be on the most current version of your device's operating system. Please refer to the guides and recourses of from your device's manufacturer for the most current information on any operating system updates.

Updating Mobile Caregiver+ on an Android Device

- 1. On your Android, go to Play Store.
- 2. Find and open the Mobile Caregiver+ app.
- 3. Touch *Update*.

Updating Mobile Caregiver+ on an Apple Device

Note: If you have an Apple 11, Mobile Caregiver+ will update automatically. For previous versions, follow the instructions below.

- 1. On your Apple, go to Apple Store.
- 2. Find and open the Mobile Caregiver+ app.
- 3. Touch *Update*.

Note: If your device supports auto updating, it is best to set the device to "auto update."

- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out



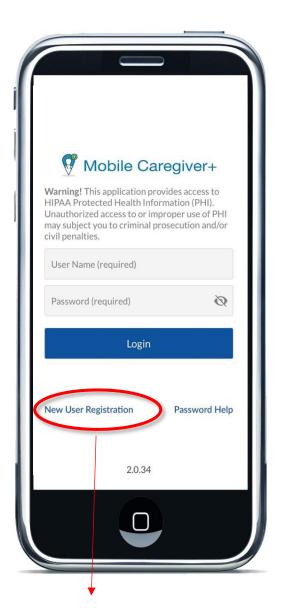
Self-Registering: Only applies if directed by your Agency Administrator to do so.

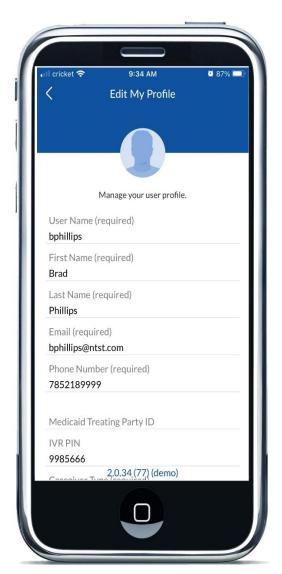
You are here: Mobile Caregiver+ > Getting Started > Self Registering

Note: If your device has face or fingerprint recognition as security options, be sure to turn it on from the Main Menu. Otherwise, you will need to use a PIN to unlock the app.

- 1. After installing the Mobile Caregiver+, open it and, tap **New User Registration** on the logon screen.
- 2. When the New User Registration page opens, complete all required fields (marked with *).

12





Do NOT use unless instructed by your Agency Administrator

- User name: Enter a user name that is easy to remember; it must be unique from any other User who has previous registered.
- Password: Enter a password that is unique to you; you are the only one who should know it.
- First Name and Last Name.
- Email: Enter your email address. The combination of email and phone number must be unique for each user; do not use a generic corporate email address.



 Phone Number: Enter your phone number. The combination of email and phone number must be unique for each user; do not use the main number for an agency.

Note: For users who work for more than one Home Health Agency, the same user name and password CAN be used for all agencies.

- Rendering Provider ID/Medicaid ID: Enter the 9-digit ID assigned to you if you have one.
- IVR PIN: This functionality has a separate process and requires approval.
- Caregiver Type: use the drop-down list to select your position or role.
- 3. Tap *Submit*.

Note: If your device does not have <u>face or fingerprint identification</u>, or if neither is turned on, you will be prompted to enter a 4-digit security code that you will use to unlock the app.

You will receive your username and password via email from the Mobile Caregiver+ System after you've self-registered. This information will be required to log in to Mobile Caregiver+.

- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Logging In
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out



Logging In

You are here: Mobile Caregiver+ > Getting Started > Logging In

After you <u>self-register</u>, you will receive an email with the subject line 'Update your Account.' The email provides a link to a web page where you can verify your email address and enter a new password. You only need to complete that step once, then you're ready to log in.

Note: If you do not see the email, check your Junk or Spam folder.

To log into Mobile Caregiver+:

- 1. Tap the Mobile Caregiver+ icon to launch Mobile Caregiver+.
 - Enter your User name.

If you need help with your user name, contact customer support at 833-483-5587 or eevvsuppot@ntst.com

Enter your Password.

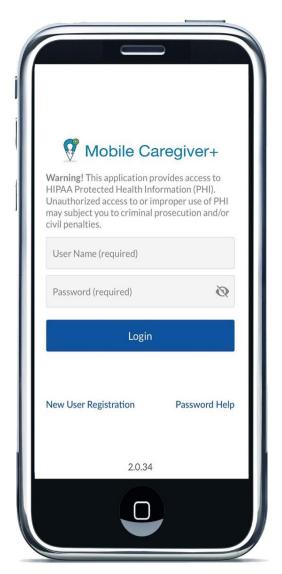
Note: The password is hidden by default; tap the "eye" icon if you need to see it.

If you forgot your password, simply tap *Password Help* to reset your password. Or, contact your system administrator who can also reset your password, if necessary. You will receive an email with the subject line "Update Your Account." It will contain a link that allows you to enter a new password. This link is valid for 36 hours; if you do not change your password within that time, you will need to reset your password again.

- 2. Tap *Login*.
- 3. Unlock the app by using the security feature your device is set up for: fingerprint ID, face ID, or passcode.

You will remain logged in until you log out of the app; however, the app will lock any time your device goes to sleep or any time you navigate to a different app. Again, to unlock the Mobile Caregiver+ app, use the security feature your device is set up for: fingerprint ID, face ID, or passcode.

15





- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu



- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out



Forgetting your Password

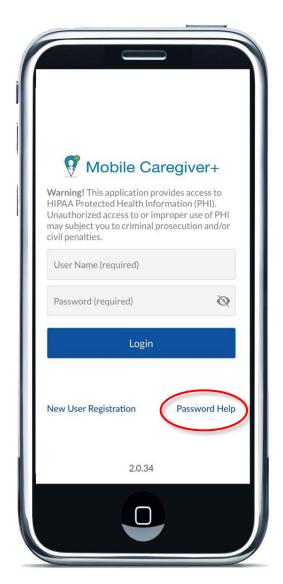
You are here: Mobile Caregiver+ > Getting Started > Forgetting your Password

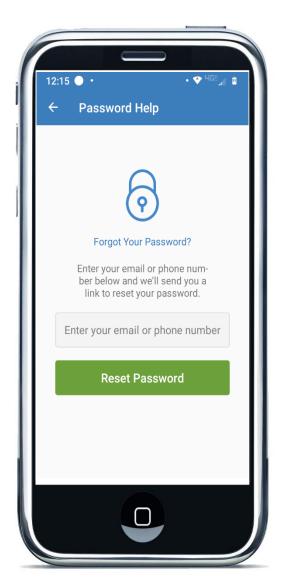
If you forget your password, you can reset it from the Mobile Caregiver+ logon screen:

- 1. Tap *Password Help*.
- 2. Enter your email address or phone number.
- 3. Tap *Reset Password*.

You will receive an email with the subject line "Update Your Account." It will contain a link that allows you to enter a new password. This link is valid for 36 hours; if you do not change your password within that time, you will need to reset your password again.

17





- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Changing your Password
- Accessing the Main Menu

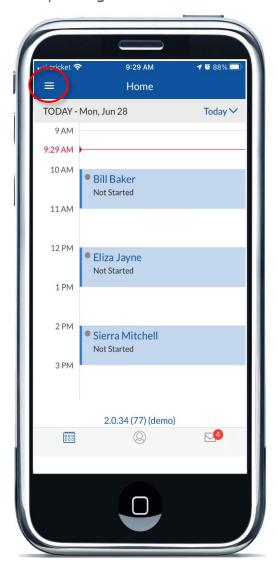
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

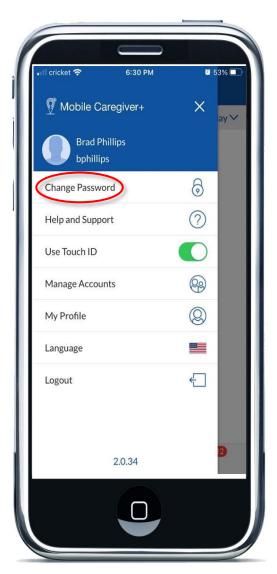


Changing Your Password

You are here: Mobile Caregiver+ > Getting Started > Changing Your Password

- 1. Tap the **Main Menu** icon in the upper left-hand corner of the screen.
- 2. Tap *Change Password*.





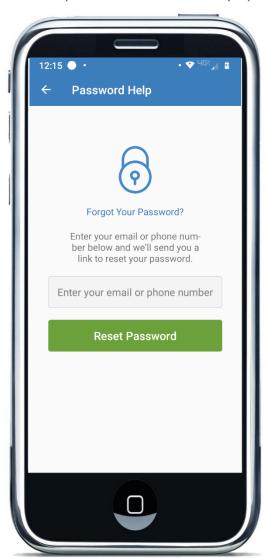
3. When the **Change Password** screen appears, enter your **Old Password**, your **New Password** and then retype your new password in the **Confirm Password** field.

All entries are hidden by default. Tap the "eye" icon on any of these fields, to see your entry.



4. Tap *Change Password*.

Your password is successfully updated.





- Mobile Caregiver+ Overview
- <u>Installing Mobile Caregiver+</u>
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

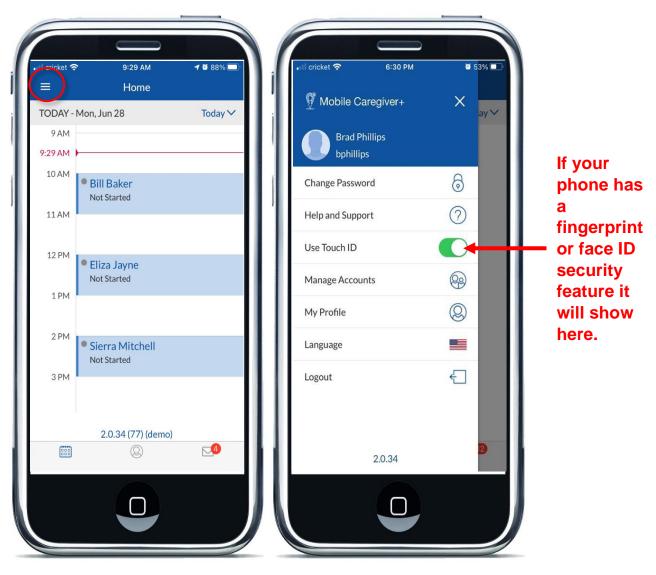


Accessing the Main Menu

You are here: Mobile Caregiver+ > Getting Started > Accessing the Main Menu

The **Main Menu** icon, sometimes called the "hamburger" icon, is located in the upper left-hand corner of the Mobile Caregiver+ screen.

- 1. Tap the icon to display the full menu.
- 2. You can access the features listed below from the Main Menu.



Change Password



- Help and Support provides access to phone support
- Use Fingerprint or Use Face ID: (This function is available only on devices that have fingerprint ID or face ID capabilities. If your phone has either, and you use them to secure your device, move the toggle to the right to turn this feature on. If your phone has either, and you do not use them to secure your device, leave the feature turned off (toggle to the left); you will be prompted to enter a 4-digit security code during self registration.
- Manage Accounts, where you can view invitations from agencies that you have accepted. These are your active accounts.
- Manage Profile, where you can change your name, address, and other personal information.
- <u>Change Language</u> allows you to select the language that you want to see in the Mobile Caregiver+ app.
- <u>Logout</u> allows you to log out of the app.

- <u>Mobile Caregiver+ Overview</u>
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

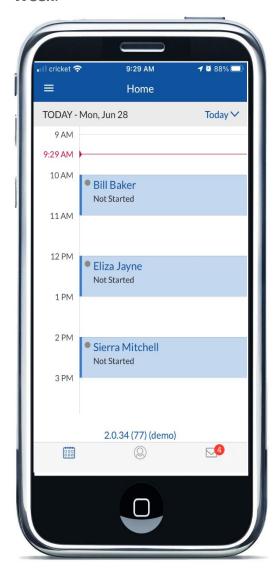
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

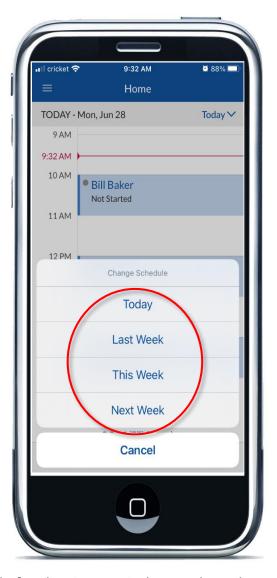


Changing the Time Period View on the Home Page

You are here: Mobile Caregiver+ > Getting Started > Changing the Time Period View on the Home Page

When you open the Mobile Caregiver+ it opens to the home page where you will see your schedule. The default schedule view is 'Today.' Tap the time period drop-down list in the upper right corner to choose another time period: Last Week, This Week, or Next Week.





The **Home** page now displays the schedule for the time period you selected.



Visits are color coded with a dot to the left of each scheduled visit. The color of the dot indicates the **Status** of the scheduled visit:

- Green: successfully completed.
- Red: visit was not completed.
- Yellow: provider is late for the scheduled visit.
- Gray: scheduled visit has not been started.

- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

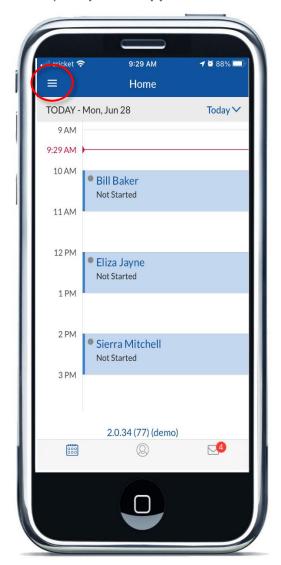
- Accessing the Main Menu
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

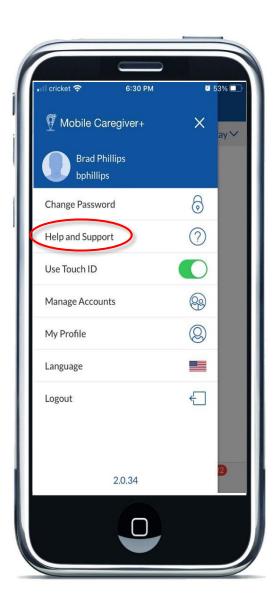


Accessing Help and Support

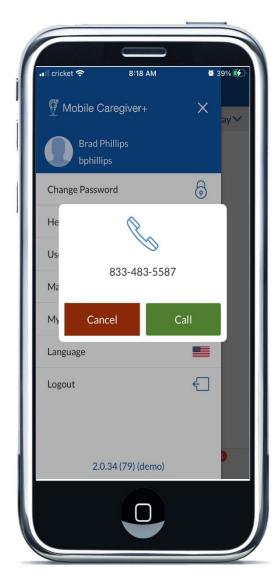
You are here: <u>Mobile Caregiver+</u> > <u>Getting Started</u> > Accessing Help and Support

- 1. Tap the **Main Menu** icon in the upper left-hand corner of any page to open the menu.
- 2. Tap Help and Support.





3. Tap *Call* to speak to a Customer Support Representative.



- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- <u>Changing the Time Period View on</u> <u>the Home Page</u>
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out



Viewing Active Agencies (Accounts)

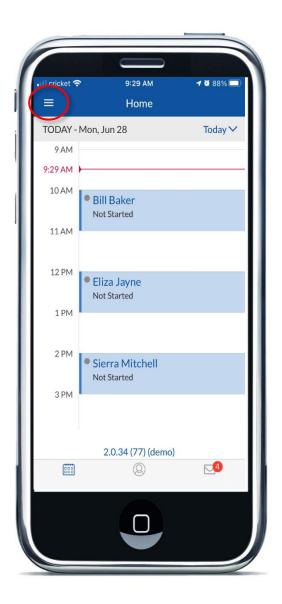
You are here: Mobile Caregiver+ > Getting Started > Installing Mobile Caregiver+

The agencies you work for are called "accounts" in Mobile Caregiver+. The system administrator for an account will "invite" you to join the account by email. When you accept an invitation, it will appear on the *Manage Accounts* page. To see accepted invitations:

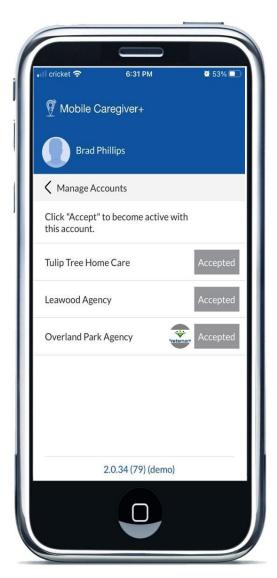
- 1. Tap the **Main Menu** icon in the upper left corner of your screen.
- 2. Tap Manage Accounts.

All accepted accounts will appear under Managed Accounts.

28







- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Managing your Profile
- Checking Messages
- Logging Out

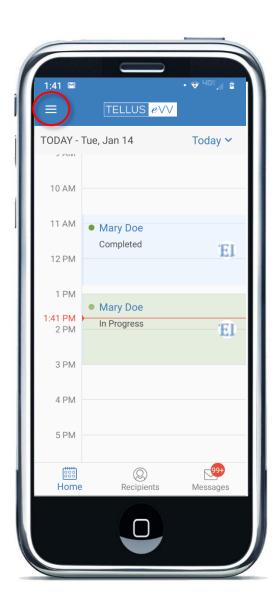


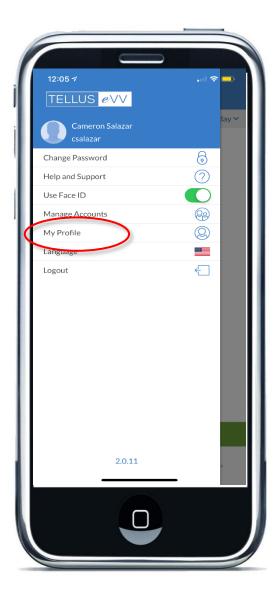
Managing Your Profile

You are here: Mobile Caregiver+ > Getting Started > Managing Your Profile

When you self-registered, you should have entered most information in your profile. You should update your profile to complete any remaining information. Of course, you can change your profile information at any time. Follow these steps:

- 1. Tap the **Main Menu** icon in the upper left-hand corner of the page.
- 2. Tap My Profile to open the My Profile page.



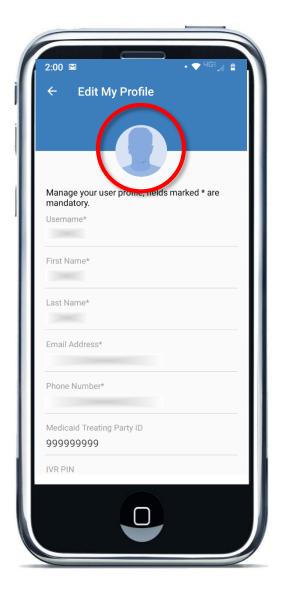


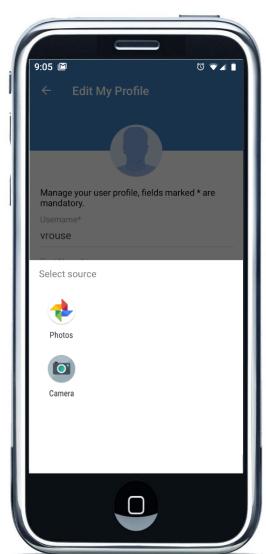


3. You can edit the following information (you will need to scroll down to see all fields and to see the *Save* button).

Note: Fields with * are required.

 Add a photo: Tap the image area and either take a new picture or select from your existing photos.







- The following information should have been entered when you <u>self-registered</u>;
 edit any of the following fields, if needed.
 - **User name**: Update your user name using one that is easy to remember; it must be unique from any other User who has previously registered.
 - Password: Enter a new password. Be sure it is unique to you; you are the only one who should know it.
 - First Name and Last Name can both be changed.
 - **Email**: Update your email address if needed. Remember, the combination of email and phone number must be unique for each user, so do not use a generic corporate email address.
 - **Phone Number**: Update your phone number if needed. Remember, the combination of email and phone number must be unique for each user; do not use the main number for an agency.

Note: For users who work for more than one Home Health Agency, the same user name and password CAN be used for all agencies.

- Rendering Provider ID/Medicaid ID: Update the 9-digit ID assigned to you if you have one.
- IVR PIN: This functionality is not currently enabled, but the field is required; enter any 7-digit number.
- Caregiver Type: Use the drop-down list to change your position or role, if needed.
- The following information was not requested during self-registration, but some fields are required (marked with *):
 - Date of Birth: Tap the calendar icon to open a calendar to select your date of birth.
 - **SSN last 4**: Enter the last four digits of your social security number.
 - Address Line 1, Address Line 2, City, State, and Zip are optional fields.
- 4. When you finish, tap *Save* at the bottom of the screen.



- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Checking Messages
- Logging Out



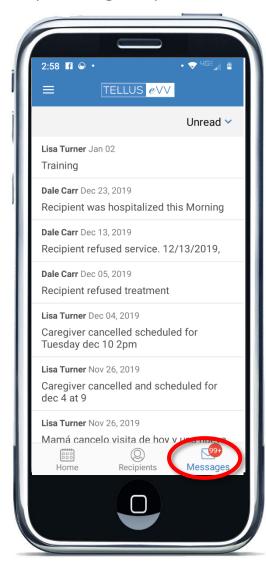
Checking Messages

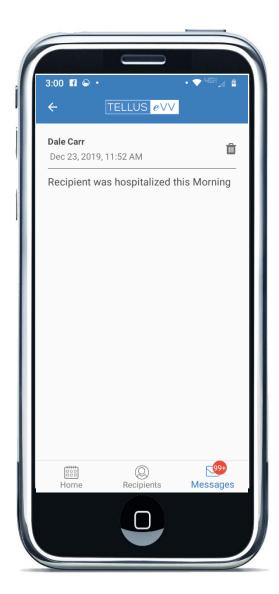
You are here: Mobile Caregiver+ > Getting Started > Checking Messages

Viewing Messages

When your administrator adds a note to a Recipient record, it will come to you as a message.

- 1. Tap *Messages* at the bottom of any page to see messages.
- 2. Tap a message to open it.



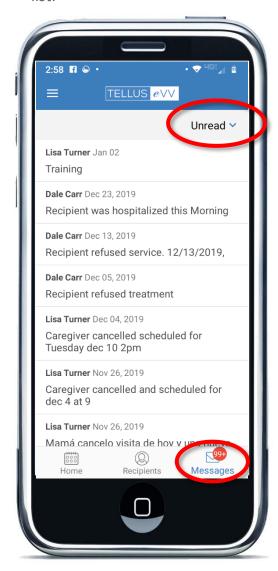


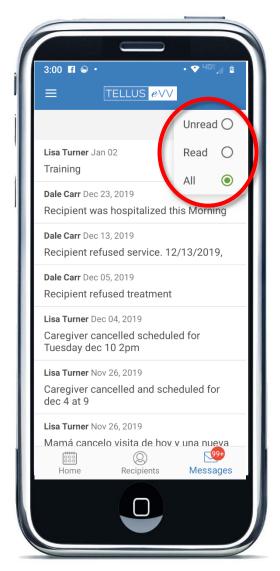


Filtering Messages

You are here: Mobile Caregiver+ > Getting Started > Checking Messages > Filtering Messages

- 1. Tap *Messages* at the bottom of any page to see messages.
- 2. Tap the arrow in the upper right corner and make a selection from the dropdown list.





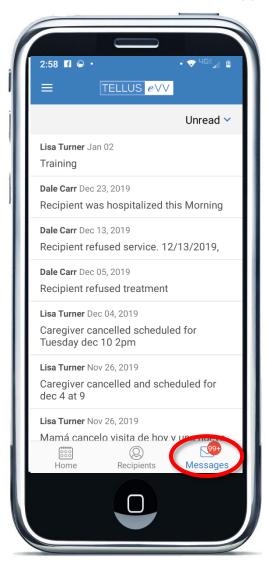


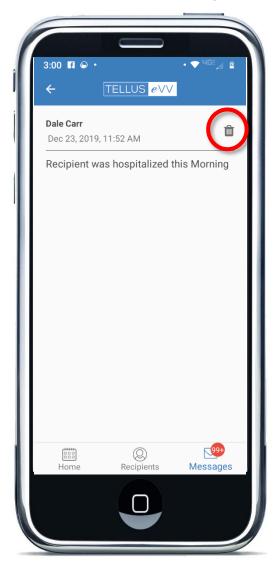
Deleting a Message

You are here: Mobile Caregiver+ > Getting Started > Checking Messages > Deleting a Message

To delete a message:

- 1. Tap *Messages* at the bottom of the screen.
- 2. Tap a message.
- 3. Use the trash can icon in the upper right corner to delete the message







- Mobile Caregiver+ Overview
- <u>Installing Mobile Caregiver+</u>
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Logging Out



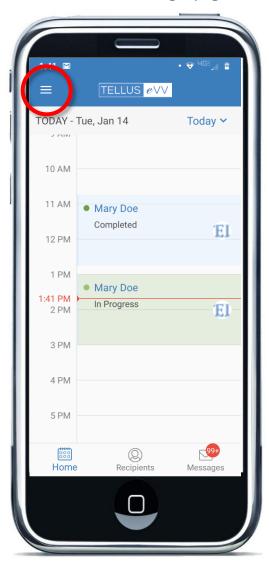
Logging Out

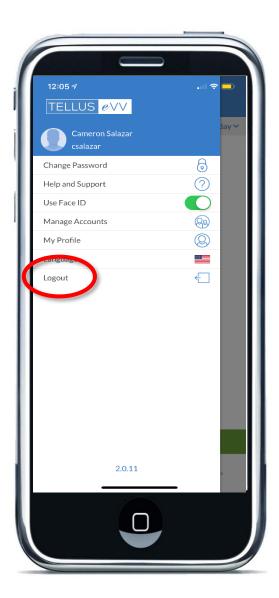
You are here: Mobile Caregiver+ Caregiver+ > Getting Started > Logging Out

To log out of Mobile Caregiver+:

- 1. Tap the Main Menu icon in the upper left-hand corner of the page.
- 2. Tap *Logout*.

You return to the login page.







- Mobile Caregiver+ Overview
- <u>Installing Mobile Caregiver+</u>
- Updating your App
- Self-registering
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages



Preparing for a Visit

Click a topic below:

Viewing Recipients

Adding an Unscheduled or New Visit

Getting Directions to a Recipient's Address

Calling a Recipient or Emergency Contact

Viewing a Recipient's Documents

Viewing a Recipient's Notes

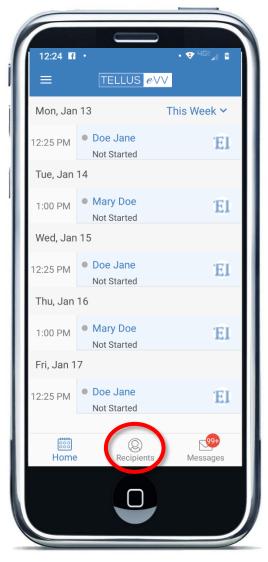


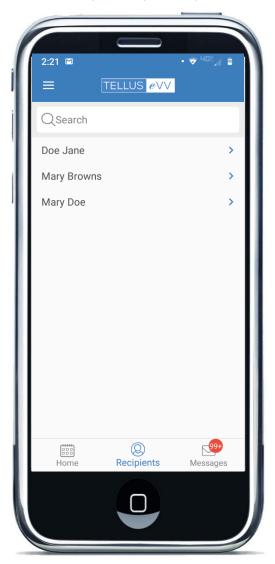
Viewing Recipients

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing Recipients

To view Recipient information:

- 1. Tap **Recipients** at the bottom of any page.
- 2. Tap the right arrow or type the name for the Recipient's profile you want to see.

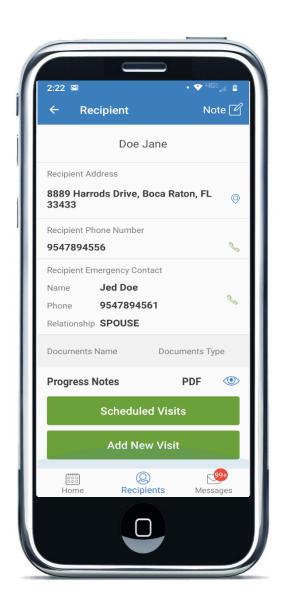




- 3. On the Recipient's profile page, you can:
 - View the Recipient addresses Touch the map pin to the right of an address to open Google maps.



- <u>Call the Recipient</u> by touching the phone icon to the right of the Recipient phone number.
- <u>Call the Emergency Contact</u> by touching the phone icon to the right of the Recipient Emergency Contact.
- View documents that have been uploaded by your system administrator. You will need to scroll to the bottom of the screen to see them. Documents are in .pdf format and are for viewing only.
- Tap <u>Scheduled Visits</u> to see visits scheduled for the Recipient, both past and present.
- Use the <u>Add New Visit</u> to schedule a visit for the Recipient.
- Tap *Notes* at the top of the page to <u>view notes</u> that were entered for visits.



- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- <u>Calling a Recipient or Emergency</u>
 <u>Contact</u>
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes



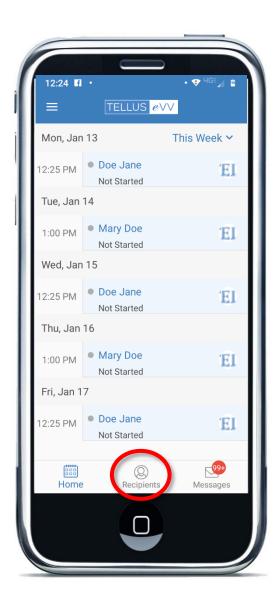
Adding an Unscheduled or New Visit

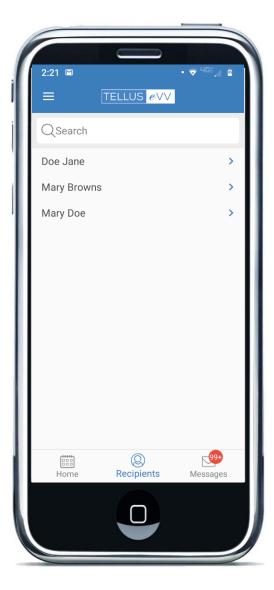
You are here: Mobile Caregiver+ > Preparing for a Visit > Adding an Unscheduled or New Visit

The ability to schedule a new visit from Mobile Caregiver+ is an option that is available on the Recipients Screen.

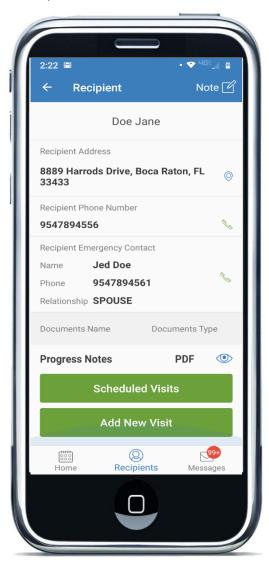
To schedule a visit:

- 1. Tap **Recipients** at the bottom of the screen.
- 2. Tap the right arrow, or caret to select the Recipient.

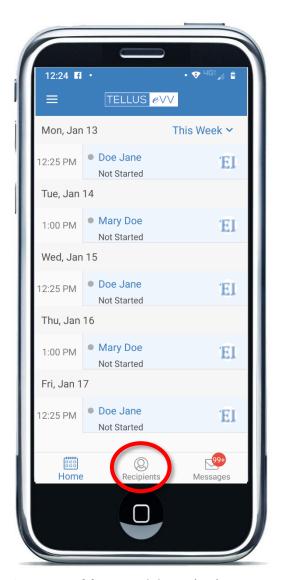


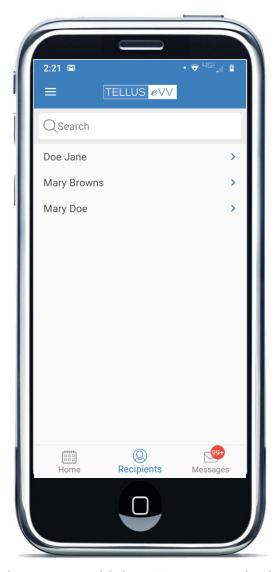


3. Tap the *Add New Visit* button to open the New Visit page.

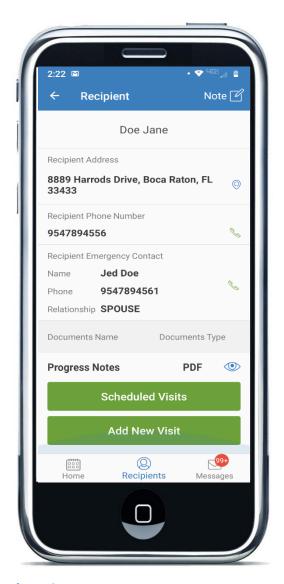


- 4. The Agency and Recipient name are auto populated. Select the **Recipient Address** where the visit will occur.
- 5. Tap Payer to auto populate the Payer field.
- 6. Touch the calendar icon to open a calendar to select the visit date.
- 7. Touch the clock icon to open a clock to select the visit time.
- 8. Check each service that will be performed.





9. Tap Add New Visit at the bottom of the page to add the visit to your schedule.



- Viewing Recipients
- Getting Directions to a Recipient's Address
- <u>Calling a Recipient or Emergency</u>
 <u>Contact</u>
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

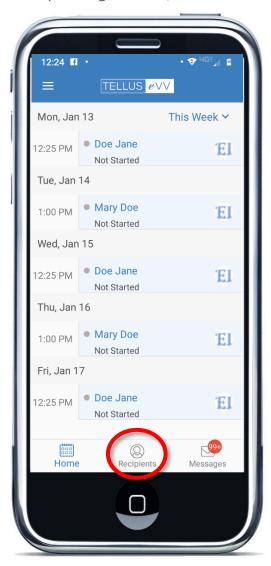


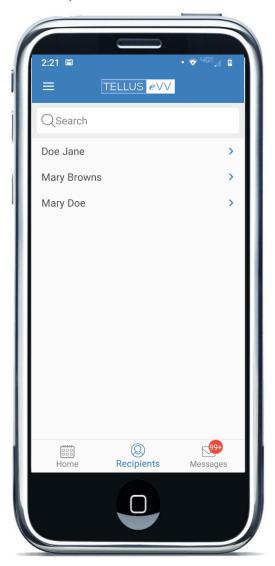
Getting Directions to a Recipient's Address

You are here: Mobile Caregiver+ > Preparing for a Visit > Getting Directions to a Recipient's Address

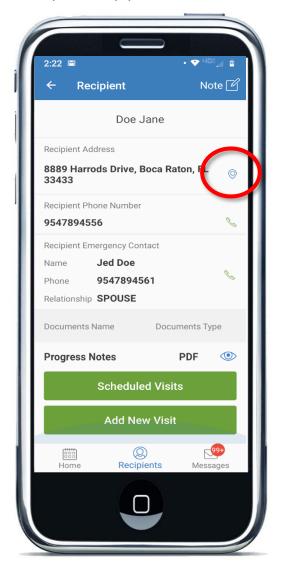
To see all addresses on file for a particular Recipient and to get directions to a location:

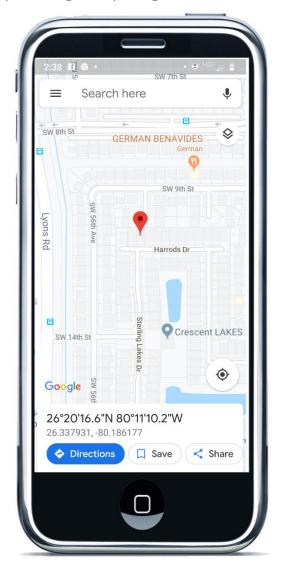
- 1. Select a visit or tap the **Recipients** icon at the bottom of any page.
- 2. Tap the right arrow, or caret to select the Recipient.





3. Tap the map pin for the address to open Google Maps to get directions.





- Viewing Recipients
- Adding an Unscheduled or New Visit
- <u>Calling a Recipient or Emergency</u>
 <u>Contact</u>
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

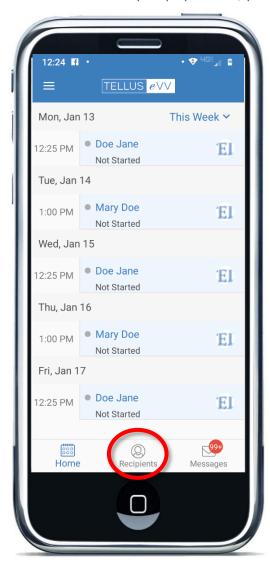


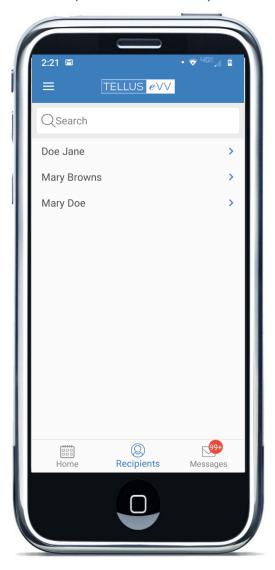
Calling a Recipient or Emergency Contact

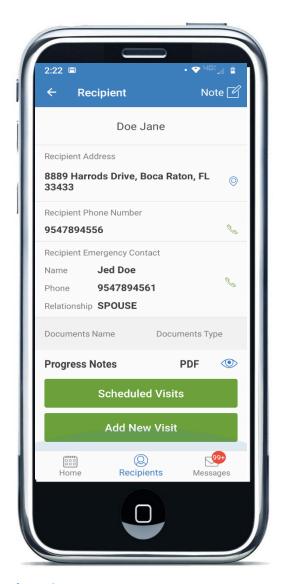
You are here: Mobile Caregiver+ > Preparing for a Visit > Calling a Recipient or Emergency Contact

To call a Recipient or Emergency Contact:

- 1. Tap **Recipients** at the bottom of any page.
- 2. Tap the right arrow, or caret to select the Recipient.
- 3. Tap the phone icon next to the Recipient or Emergency Contact to open the calling feature on your device.
- 4. The number is pre-populated; place the call as you would normally.







- <u>Viewing Recipients</u>
- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

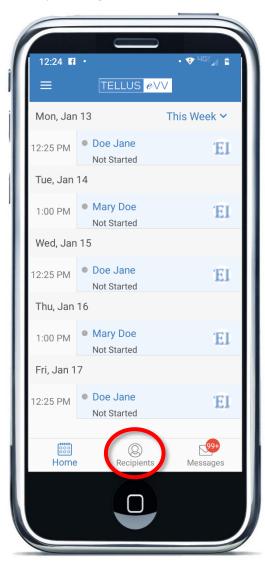


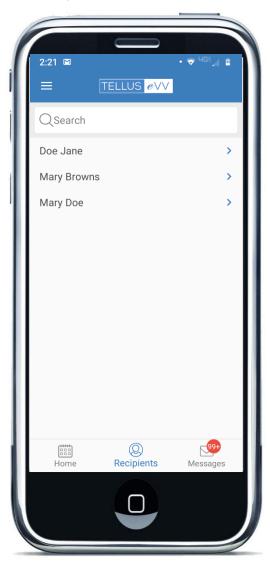
Viewing a Recipient's Documents

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing a Recipient's Documents

Your system administrator may have scanned and uploaded documents, such as progress notes, to a Recipient. To view Recipient documents:

- 1. Tap **Recipients** at the bottom of any page.
- 2. Tap the right arrow, or caret to select the Recipient.

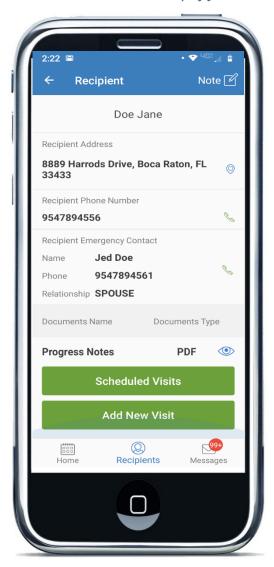






3. Scroll to the bottom of the page to see available documents; tap the one you want to open.

Note: Documents are in .pdf format and are for viewing only.



- <u>Viewing Recipients</u>
- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- Calling a Recipient or Emergency Contact
- Viewing a Recipient's Notes

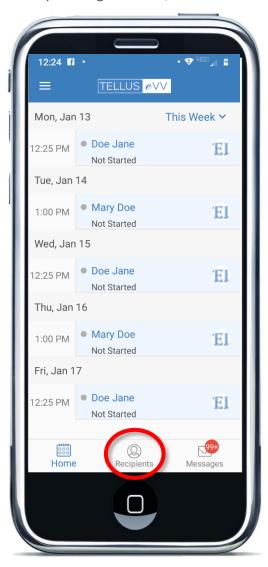


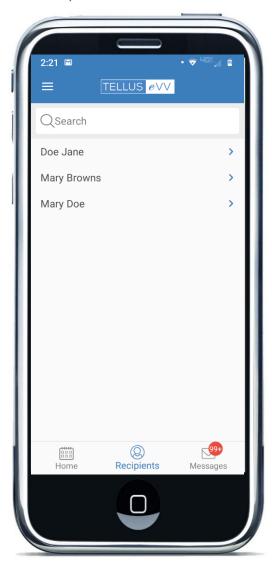
Viewing a Recipient's Notes

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing a Recipient's Notes

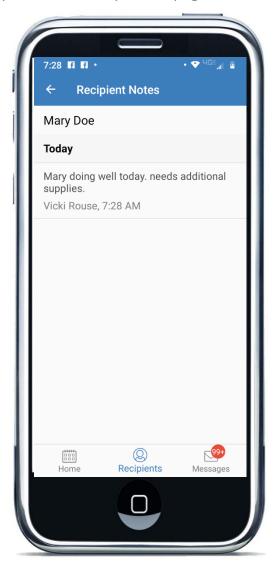
You may have entered notes during a visit for a recipient. To review them using your Mobile Caregiver+ application:

- 1. Tap **Recipients** at the bottom of any page.
- 2. Tap the right arrow, or caret to select the Recipient





3. Tap **Note** at the top of the page to view notes that were entered for the Recipient.



- Viewing Recipients
- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- <u>Calling a Recipient or Emergency</u>
 <u>Contact</u>
- Viewing a Recipient's Documents



Managing Visits

Click a topic below:

Starting and Ending a Visit

Completing a Visit When you are Offline

Adding Notes and Sending Alerts



Starting and Ending a Visit

You are here: Mobile Caregiver+ > Managing Visits > Starting and Ending a Visit

To start a visit:

1. On the **Home** page, tap the appointment for the Recipient you want to start services for.

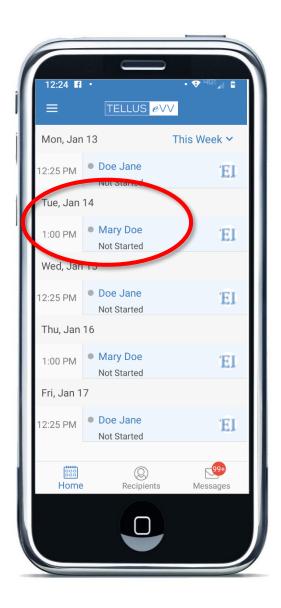
The **Start Visit** page opens.

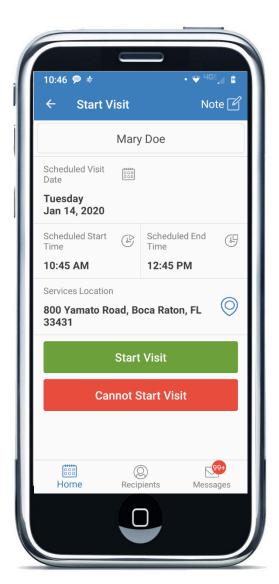
2. Tap **Start Visit**.

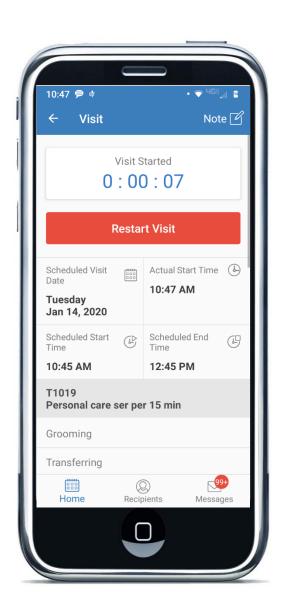
A timer at the top of the screen starts. Scroll down to see tasks that need to be completed.

Note: If you want to add notes or send alerts, tap the **Note** icon in the upper right corner of the page. See <u>Adding Notes and Sending Alerts</u> for more information.

58

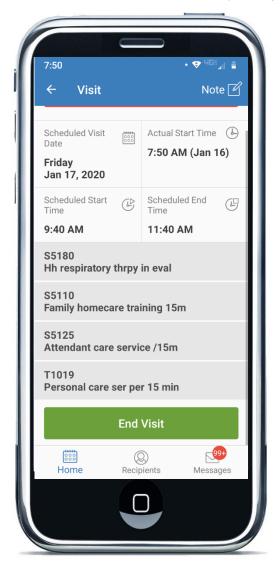


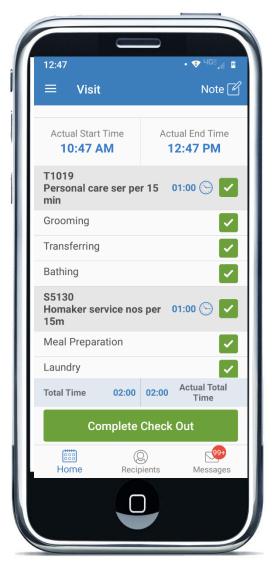






- 3. After you complete all services, tap *End Visit*.
- 4. All tasks will be checked; tap Complete Check Out.





5. Tap the *Recipient*.

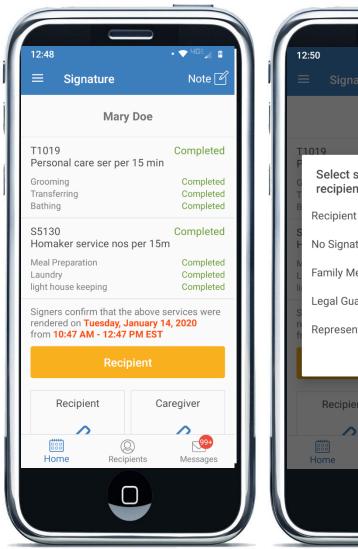
Note: If the Recipient him or herself will sign you can simply tap the Recipient signature box to open it.

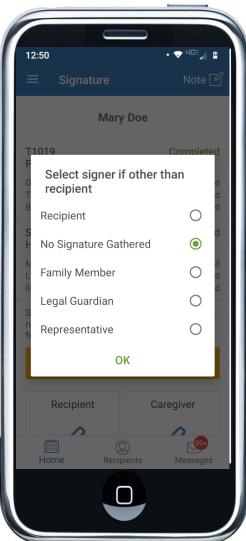


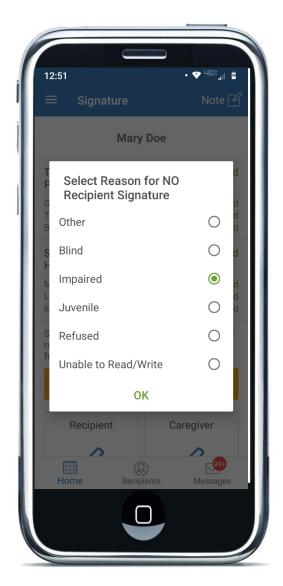
6. Select the role of the person who will sign.

If you select **Recipient**, you will continue to the signature screen.

If you make a selection other than Recipient, another selection box will open. Select the reason that the Recipient is not able to sign. Then you will continue to the signature screen.

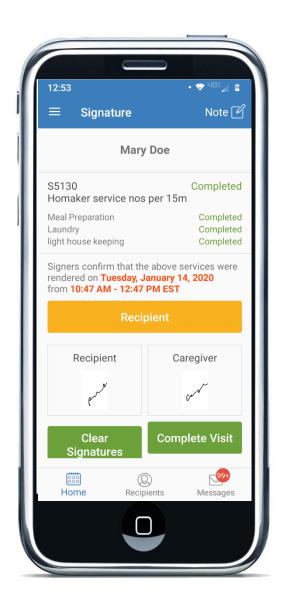






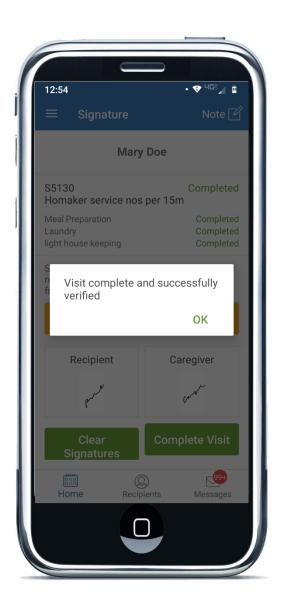
- 7. Ask the Recipient or Family Member to sign in the space provided using their finger or a stylus if you have one.
- 8. When they finish, tap *Complete*.
- 9. Tap the *Caregiver* signature box and sign in the space provided using your finger or stylus if you have one.
- 10. Tap *Complete*.





11. Tap Complete Visit.

An alert will appear, indicating that the visit is complete and successfully verified.



- Completing a Visit when you are Offline
- Adding Notes and Sending Alerts



Completing a Visit When you are Offline

You are here: Mobile Caregiver+ > Managing Visits > Completing a Visit When you are Offline

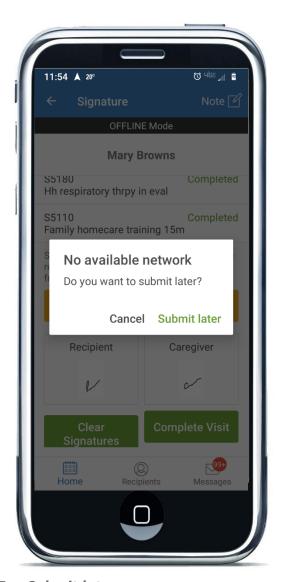
The Mobile Caregiver+ application allows you to complete visits in remote areas and "dead-zones," where neither Wi-Fi nor cellular services are available. This is called operating in OFFLINE Mode. If you anticipate that you will be in an offline area, we recommend that you log in to Mobile Caregiver+ in the morning before you start your visits, from a zone that does have service (your home/office/coffee shop or anywhere that has internet connectivity), and again in the evening after completing your visits.

Note: You must login to Mobile Caregiver+ from a location that has Wi-Fi or cellular service within 12 hours prior to using the device in OFFLINE Mode.

When you are offline, visit data is encrypted and stored on your device until you return to a location with internet connectivity. When you log in again, the Mobile Caregiver+ application transmits the encrypted visit data. Your System Administrator cannot view visit data from your mobile device until you reconnect and the information is uploaded.

To complete visits in offline mode:

- 1. Complete the visit as you would normally.
 - See Starting and Ending a Visit if you need help.
- 2. After you complete the visit, a dialog box opens, letting you know that you are offline:



3. Tap Submit later.

Note: Remember, your System Administrator will not see visit data until you log into Mobile Caregiver+ from a location that has internet connectivity.

Related Topics

• Starting and Ending a Visit

Adding Notes and Sending Alerts



Adding Notes and Sending Alerts

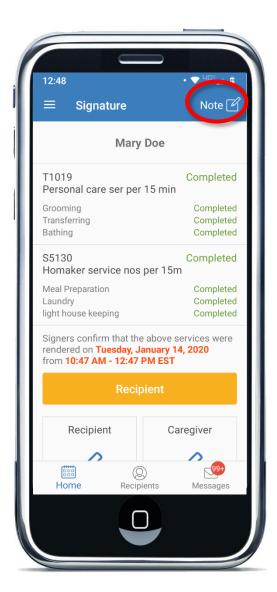
You are here: Mobile Caregiver+ > Managing Visits > Adding Notes and Sending Alerts

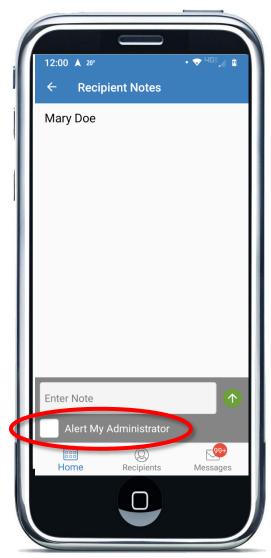
You can add notes to a Recipient record at any time during a visit. If the note needs the attention of your administrator, you can mark the note as an alert and it will be sent to him/her.

To enter a note during an active visit:

- 1. Tap **Note** in the upper right-hand corner of either the **Start Visit**, **Visit** or **Signature** pages.
- 2. If you want the note sent to your administrator, check the *Alert My Administrator* box. This will send a safe, secure, instant message to your administrator.

68







3. Touch **Enter Note** and type your note.

Notes are stored in the Recipient record, providing a valuable source of information on the Recipient's health and wellbeing over time.

Important: Mobile Caregiver+ Note section <u>is not</u> to replace any program notation process in place.

4. Click the green arrow to save; if the note is an alert it will be sent to your administrator.





• Starting and Ending a Visit

• <u>Completing a Visit when you are</u> <u>Offline</u>